

Art Unit : 2173
Examiner : Hailu, T.
Serial No. : 09/928,009
Filed : April 20, 2001
Inventor : Heiser
Title : Multi-Level Software for Generating Wills and Trusts Online

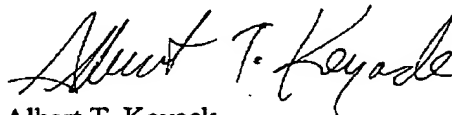
Dated: March 9, 2005

REMARKS

Claims 1-10 are pending in this application. Claims 1-7 and 9-10 have been amended and claim 8 cancelled by the Response filed on June 22, 2004. The revised amendments set forth above and on the attached sheets of "clean" claims correct the deficiencies in the status identifiers noted in the Notice of Non-Compliant Amendment. No substantive amendments to the claims are being made.

It is respectfully submitted that the present application, upon entry of the amendments in the format set forth above, is now in a condition to be allowed. Notice to this effect is earnestly solicited.

Respectfully submitted,



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CLAIMS INCORPORATING AMENDMENTS

Please amend the claims 1-7 and 9-10 and cancel claim 8 as follows:

1. (Currently amended) A method of automatically generating a will document, comprising:
providing a user with a plurality of input screens, arranged in a sequential and logical order, wherein said screens include an initial screen for selecting as between at least two levels of complexity, wherein each of said levels of complexity will subsequently provide one or more different screens requiring: personal and family information, financial information, asset information, estate distribution selections, trust parameter selection, and guardian and trustee selections; and
processing data input by an end-user to automatically create a will document.
2. (Currently amended) The method of claim 1, further comprising selectively precluding a user from viewing a second screen subsequent to viewing a first screen until data is entered into said first screen.
3. (Currently amended) The method of claim 1, further comprising a prefatory step of selecting between a plurality of levels of complexity for said will document, wherein each level of complexity requires less input data from said input screens.
4. (Currently amended) The method of claim 3, wherein said prefatory step comprises selecting among three levels of complexity.
5. (Currently amended) A software program for effecting a method of effecting an interactive process, wherein there are at least three levels of interaction one of which is selected by an end user, wherein said three levels comprise:

a first level wherein a user inputs a first data set to a plurality of data input sections, and a null entry is not permitted;

a second level of less complexity than said first level wherein said software program makes assumptions based on limited data input by an end user, wherein said limited data is less data than said first data set; and

a third level of less complexity than said second level wherein said software program selects between several pre-determined outputs based upon basic data input by an end user, wherein said basic data is less data than said limited data set.

6. (Currently amended) The software program of claim 5 wherein the interactive process is the process of generating a will.
7. (Currently amended) A method of effecting an interactive process for generating a will or trust document using a computing device comprising:
 - providing an initial data entry section wherein a user selects between two or more levels of data entry question complexity;
 - providing a subsequent plurality of data entry questions which differ based upon the level of data entry question complexity chosen, wherein the data entry questions to collect personal and financial data;
 - processing said data to calculate net worth and other parameters relevant to a will or trust; and
 - processing said data to create a printable document; that includes both data entered directly by an end user and data derived from data entered by an end user.
8. (Cancelled)
9. (Currently amended) The method of claim 7, wherein there are three levels of data entry question complexity.
10. (Currently amended) The method of claim 7, further comprising the step of precluding processing said data to create a printed document if a null value is entered for one or more of said data entry questions.